

**ESTIMATED RELOCATION EXPENSE WORKSHEET**

This worksheet provides the necessary guidance to help you estimate the cost of your relocation with the exception of Relocation Income Tax Allowance (RITA), Federal Insurance Contributions Act (FICA) and Health Insurance Tax (HIT). This worksheet will be used by the Finance Office to enter your move in the Integrated Travel Manager Relocation (ITMR) system and to obligate your move in the Core Financial System (CFS). The RITA, FICA, and HIT will be calculated by the ITMR system and obligated in CFS. The estimates in this worksheet should also be used when completing your Travel Order Form CD-29.

*This form is intended to be a tool to help estimate the cost of the move and create the obligation. It does not replace the CD-29 as the official travel authorization or denote eligibility to these entitlements. For more detailed information regarding a relocation, go to the Finance Office Travel Web Page at <http://www.rdc.noaa.gov/~finance/travel.htm> and click on Relocation.*

*This form must be completed and submitted to the Finance Office along with your Travel Order, Form CD-29 and a copy of the Request for Authorization of Travel and Moving Expenses, Form CD-150.*

For assistance completing this form, please contact the PCS Specialist located in the Finance Office servicing your new duty station:

<u>Transferee's New Duty Station Serviced by:</u>	<u>Telephone Number</u>	
Eastern Administrative Support Center (EASC)	(757) 441-6527	Wanda Gonsalves
Central Administrative Support Center (CASC)	(816) 426-7543 x418/438	Debbie Ferrara / Donna Newport
Mountain Administrative Support Center (MASC)	(303) 497-6199	Steve Tatum
Western Administrative Support Center (WASC)	(206) 526-4426	Merna Grantham
Accounting Operations Division (AOD)	(301) 427-3049 x113	Nanette Naylor-Bah

NAME: \_\_\_\_\_ SSN: \_\_\_\_\_ Travel Order #: \_\_\_\_\_

If amending the original order, enter an amendment sequence number here (1, 2, 3.....) Amendment Seq. # \_\_\_\_\_

Explain the reason for the amendment: \_\_\_\_\_

**I. GENERAL INFORMATION:** The following information is required in order to correctly obligate your relocation expenses.

Retirement Plan:	<input type="checkbox"/> CSRS	<input type="checkbox"/> FERS	<input type="checkbox"/> Other (CSRS-OFFSET)
Filing Status:	<input type="checkbox"/> Married Filing Separately	<input type="checkbox"/> Single	
	<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household	
Estimated Annual Earnings:	Employee _____	Self Employed _____	
	Spouse _____	Self Employed _____	
Tax State:	_____		
Tax Rates (if known)	Percentage:	Expressed as a % of:	
	County _____	<input type="checkbox"/> Income	<input type="checkbox"/> Federal Tax <input type="checkbox"/> State Tax
	City _____	<input type="checkbox"/> Income	<input type="checkbox"/> Federal Tax <input type="checkbox"/> State Tax
	Other _____	<input type="checkbox"/> Income	<input type="checkbox"/> Federal Tax <input type="checkbox"/> State Tax
Relocation Special Status:	<input type="checkbox"/> None (All Transfers not covered by one of the following) <input type="checkbox"/> New Appointee ( <i>New Employees should complete Sections I, III, V, VII, and X only</i> ) <input type="checkbox"/> Last Move ( <i>SES Employees only</i> ) <input type="checkbox"/> Overseas Tour Renewal <input type="checkbox"/> Return for Purpose of Separation <input type="checkbox"/> Reduction in Force		
Distance:	Old Residence to Old Duty Station	_____	
	Old Residence to New Duty Station	_____	
	Old Duty Station to New Duty Station	_____	

**II. HOUSEHUNTING TRIP (FTR 302-5):** Maximum of 10 days authorized. For CONUS, per diem rates for househunting may be at the current locality rate (\*) *but only if specifically approved* on the travel order. Otherwise, the standard CONUS rate of \$55 for Lodging and \$30 for M&IE applies. When driving by POV, calculate per diem based on driving 300 miles per day.

Approximate Travel Dates:      Begin \_\_\_\_\_      End \_\_\_\_\_  
Rate Authorized:                      **G** CONUS Rate                      **G** OCONUS  
Daily Rate(\*):                      Lodging \_\_\_\_\_                      M&IE \_\_\_\_\_

\* To determine the locality rates go to the GSA web page at <http://policyworks.gov/> and click on Per Diem Rates.

Cost of Per Diem -*Use either Method 1 or Method 2.*

*Method 1: Use when the employee takes the househunting trip alone or when both the employee and spouse take the househunting trip together or traveling separately.*

**LODGING**

Employee:  
Daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of nights      \$ \_\_\_\_\_  
Spouse accompanying or traveling separately from the employee:  
Employee lodging total \$ \_\_\_\_\_ x .75      \$ \_\_\_\_\_

**M&IE:**

Employee:  
First & Last Days:  
Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days x .75      \$ \_\_\_\_\_  
Full Days:  
Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days      \$ \_\_\_\_\_  
Total Employee M&IE      \$ \_\_\_\_\_  
Spouse accompanying or traveling separately from the employee:  
Employee M&IE total \$ \_\_\_\_\_ x .75      \$ \_\_\_\_\_

Total Per Diem (Lodging and M&IE) using Method 1      \$ \_\_\_\_\_  
*Copy to Section X(i)*

*Method 2: Use this method when the spouse travels in place of the employee. (Computed at the same rate as the employee.)*

**LODGING**

Spouse traveling in place of employee:  
Daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of nights      \$ \_\_\_\_\_

**M&IE**

Spouse traveling in place of employee:  
First & Last Days: Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days x .75      \$ \_\_\_\_\_  
Full Days: Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days      \$ \_\_\_\_\_

Total Per Diem (Lodging and M&IE) using Method 2      \$ \_\_\_\_\_  
*Copy to Section X (i)*

Cost of Transportation.

Common Carrier: ( Charged to either CBA or Citibank travel card)      \$ \_\_\_\_\_  
*Copy to Section X (a)*

Other Transportation:

POV- *Rate determined by the number of occupants in the vehicle– one occupant @ 15¢ per mile or two occupants @ 17¢ per mile.*  
# of miles \_\_\_\_\_ x \_\_\_\_\_ ¢ per mile      \$ \_\_\_\_\_  
Taxi Fares      \$ \_\_\_\_\_  
Rental Car      \$ \_\_\_\_\_

Total Other Transportation      \$ \_\_\_\_\_  
*Copy to Section X (g)*

Other (Miscellaneous) Expenses (tolls, parking, fuel, etc...)      \$ \_\_\_\_\_  
*Copy to Section X (k)*

**TOTAL OF HOUSEHUNTING TRIP**      \$ \_\_\_\_\_

**III. TRAVEL EN ROUTE TO NEW DUTY STATION (FTR 302-4)**- When driving by POV, calculate per diem based on driving 300 miles per day. *Maximum per diem rates for travel enroute to new duty stations: CONUS - \$85 (Lodging \$55, M&IE \$30); OCONUS - locality rate.*

Approximate Travel Dates:      Begin \_\_\_\_\_      End \_\_\_\_\_  
Rate Authorized:                      **G** CONUS Rate                      **G** OCONUS  
Daily Rate(\*):                              Lodging \_\_\_\_\_                      M&IE \_\_\_\_\_

\* *To determine the locality rates go to the GSA web page at <http://policyworks.gov/> and click on Per Diem Rates.*

Cost of Per Diem

**LODGING**

Employee:  
Daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of nights      \$ \_\_\_\_\_  
Spouse - *Use either Method 1 or Method 2.*  
*Method 1 - Spouse accompanying the employee*  
Employee lodging total \$ \_\_\_\_\_ x .75      \$ \_\_\_\_\_  
*Method 2 - When spouse is traveling separately from employee, lodging is computed on the same rate basis as the employee shown above*  
Enter employee lodging total      \$ \_\_\_\_\_  
Dependents 12 years of age & over:  
# of dependents \_\_\_\_\_ x employee lodging total \$ \_\_\_\_\_ x .75      \$ \_\_\_\_\_  
Dependents under 12 years of age: compute as follows:  
# of dependents \_\_\_\_\_ x employee lodging total \$ \_\_\_\_\_ x .50      \$ \_\_\_\_\_

**M&IE**

Employee:  
First & Last: Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days x .75      \$ \_\_\_\_\_  
Full Days: Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days      \$ \_\_\_\_\_  
Total Employee M&IE      \$ \_\_\_\_\_  
Spouse: *Use either Method 1 or Method 2.*  
*Method 1 - Spouse accompanying the employee*  
Employee M&IE total \$ \_\_\_\_\_ x .75      \$ \_\_\_\_\_  
*Method 2 - When spouse is traveling separately from employee, M&IE is computed on the same rate basis as the employee shown above.*  
Enter Total Employee M&IE      \$ \_\_\_\_\_  
Dependent 12 years of age & over:  
# of dependents \_\_\_\_\_ x employee M&IE total \$ \_\_\_\_\_ x .75      \$ \_\_\_\_\_  
Dependent under 12 years of age: compute as follows:  
# of dependents \_\_\_\_\_ x employee M&IE total \$ \_\_\_\_\_ x .50      \$ \_\_\_\_\_

Total Per Diem (Lodging and M&IE) for Enroute      \$ \_\_\_\_\_

*Copy to Section X (j)*

Cost of Transportation.

Common Carrier (Charged to either CBA or Citibank travel card)      \$ \_\_\_\_\_

*Copy to Section X (b)*

**Other Transportation**

POV -*Rate determined by the number of occupants in the vehicle:*

*One occupant @ 15¢ per mile, two occupants @ 17¢ per mile,  
three occupants @ 19¢ per mile, and four or more occupants @ 20¢ per mile*

POV 1      # of miles \_\_\_\_\_ x \_\_\_\_\_ ¢ per mile      \$ \_\_\_\_\_  
POV 2      # of miles \_\_\_\_\_ x \_\_\_\_\_ ¢ per mile      \$ \_\_\_\_\_

\$ \_\_\_\_\_

*Copy to Section X (h)*

Other (Miscellaneous) Expenses (tolls, parking, fuel, etc...)      \$ \_\_\_\_\_

*Copy to Section X (l)*

**TOTAL ENROUTE TRIP**      \$ \_\_\_\_\_

**IV. COST OF SUBSISTENCE WHILE OCCUPYING TEMPORARY QUARTERS (FTR 302-6)** - Maximum Employee rates for temporary quarters: **CONUS** - \$55 for Lodging and \$30 for M&IE; **OCONUS** - locality rate.

Approximate Begin Date: \_\_\_\_\_

Rate Authorized: **G** CONUS Rate

**G** OCONUS

Daily Rate(\*): Lodging \_\_\_\_\_

M&IE \_\_\_\_\_

\* To determine the locality rates go to the GSA web page at <http://policyworks.gov/> and click on Per Diem Rates

First 30 days: *Use Method 1 or Method 2*

**LODGING:**

*Method 1: Use this method when one or two family members are occupying temporary quarters.*

Employee: Daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of nights \$ \_\_\_\_\_

Spouse: Daily lodging rate \$ \_\_\_\_\_ x .75 x \_\_\_\_\_ # of nights \$ \_\_\_\_\_

Dependents 12 yrs & over:

Daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of dependents x \_\_\_\_\_ # of nights x .75 \$ \_\_\_\_\_

Dependents under 12 yrs:

Daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of dependents x \_\_\_\_\_ # of nights x .50 \$ \_\_\_\_\_

*Method 2: Use this method when two or more family members are occupying temporary quarters. The above formula (while based on maximum allowances) could be over estimating temporary quarters costs. This method allows you to estimate lodging cost based on the actual lodging rate when it is known.*

Actual daily lodging rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of nights \$ \_\_\_\_\_

**M&IE**

Employee: Daily M&IE rate \$ \_\_\_\_\_ x \_\_\_\_\_ # of days \$ \_\_\_\_\_

Spouse: Daily M&IE rate \$ \_\_\_\_\_ x .75 x \_\_\_\_\_ # of days \$ \_\_\_\_\_

Dependents 12 yrs & over:

Daily M&IE rate \$ \_\_\_\_\_ x .75 x \_\_\_\_\_ # of dependents x \_\_\_\_\_ # of days \$ \_\_\_\_\_

Dependents under 12 yrs:

Daily M&IE rate \$ \_\_\_\_\_ x .50 x \_\_\_\_\_ # of dependents x \_\_\_\_\_ # of days \$ \_\_\_\_\_

Total Per Diem (Lodging and M&IE) for the first 30 days Temporary Quarters \$ \_\_\_\_\_

31 to 60 days- (Computed at .75 of the first 30 days)

Total for 1st 30 days \$ \_\_\_\_\_ x .75 \$ \_\_\_\_\_

**AMENDMENTS ONLY**

61 to 90 days- (Computed at .75 of the first 30 days)

Total for 1st 30 days \$ \_\_\_\_\_ x .75 \$ \_\_\_\_\_

91 to 120 days- (Computed at .75 of the first 30 days)

Total for 1st 30 days \$ \_\_\_\_\_ x .75 \$ \_\_\_\_\_

**TOTAL TEMPORARY QUARTERS:**

\$ \_\_\_\_\_

*Copy to Section X (n)*

**V. TRANSPORTATION OF HOUSEHOLD GOODS (MAX. 18,000 lbs.) & TEMPORARY STORAGE (90 DAYS) (FTR.302-7):** When an employee chooses to move his possessions himself he is reimbursed at the commuted rate. Contact your servicing transportation specialist for an estimate on household goods:

<u>Transferee's New Duty Station Serviced by:</u>	<u>Telephone Number</u>	
Eastern Administrative Support Center (EASC)	(757) 441-6468	Anita Holley
Central Administrative Support Center (CASC)	(816) 426-7543 x418/438	Debbie Ferrara / Donna Newport
Mountain Administrative Support Center (MASC)	(303) 497-6199	Steve Tatum
Western Administrative Support Center (WASC)	(206) 526-6394	Chris Donahue
Accounting Operations Division (AOD)	(301) 713-3522 x162	Charlie Hill

Transportation and Storage of Household Goods

Government Bill of Lading		
Shipping of Household Goods	\$ _____	
Mobile Home Transportation (in lieu of household goods transaction)	\$ _____	
Total Transportation Billed to Government		\$ _____
		<i>Copy to Section X (c)</i>
Temporary Storage of Household Goods		\$ _____
		<i>Copy to Section X (e)</i>
Commuted		
Shipping of Household Goods	\$ _____	
Mobile Home Transportation (in lieu of household goods transaction)	\$ _____	
Total transportation paid to employee		\$ _____
		<i>Copy to Section X (o)</i>
Temporary Storage of Household Goods		\$ _____
		<i>Copy to Section X (q)</i>
<b>TOTAL TRANSPORTATION AND STORAGE OF HOUSEHOLD GOODS</b>		<b>\$ _____</b>

**VI. EXTENDED STORAGE OF HOUSEHOLD GOODS (FTR 302-8)**

Government Bill of Lading		
Extended Storage of Household Goods		\$ _____
		<i>Copy to Section X (f)</i>
Commuted		
Extended Storage of Household Goods		\$ _____
		<i>Copy to Section X (r)</i>
<b>TOTAL EXTENDED STORAGE OF HOUSEHOLD GOODS</b>		<b>\$ _____</b>

**VII. TRANSPORTATION OF POV (FTR 302-9) - *Select only one.***

Government Bill of Lading		
Transportation of POV		\$ _____
		<i>Copy to Section X (d)</i>
Commuted		
Transportation of POV		\$ _____
		<i>Copy to Section X (p)</i>
<b>TOTAL TRANSPORTATION OF POV</b>		<b>\$ _____</b>

**VIII. REAL ESTATE (FTR 302-11 & 302-12)**

Old Residence - *Select only one.*

*NOAA's Home Sale Program: (Costs for NOAA's home sale/home purchase program will not be included on the travel order since they will be included on a purchase order. However, the cost will be obligated under the Travel Order Number by Finance.)*

Buyer Value Option (day 1-60; buyer found):

Selling price of old residence \_\_\_\_\_ x .1099 \$ \_\_\_\_\_

Amended Sale (after appraisals are ordered; buyer found):

Selling price of old residence \_\_\_\_\_ x .1285 \$ \_\_\_\_\_

Appraised Sale (after 90 days; relocation company buys the home):

Selling price of old residence \_\_\_\_\_ x .2185 \$ \_\_\_\_\_

Traditional Sale

Estimated selling price of your old residence \_\_\_\_\_ x .10 \$ \_\_\_\_\_

Lease Breaking Expenses at Old Duty Station

(No property to sell) \$ \_\_\_\_\_

Property Management Service

\$ \_\_\_\_\_

New Residence - *Select only one.*

*NOAA's Home Purchase Program:*

Estimated purchase price of new residence \_\_\_\_\_ x .05 \$ \_\_\_\_\_

(No fee for service)

Traditional Purchase

Estimated Purchase price of new residence \_\_\_\_\_ x .05 \$ \_\_\_\_\_

**TOTAL REAL ESTATE**

**\$ \_\_\_\_\_**

*Copy to Section X (s)*

**IX. MISCELLANEOUS EXPENSE ALLOWANCE (FTR 302-16) - *Select only one.***

Employee only (\$500) \$ \_\_\_\_\_

OR

Employee with immediate family (\$1,000) \$ \_\_\_\_\_

**TOTAL MISCELLANEOUS EXPENSE ALLOWANCE**

**\$ \_\_\_\_\_**

*Copy to Section X (m)*

**X. ESTIMATES FOR FORM CD-29**

		<b>Enter these Totals in Block 11 of the CD-29:</b>
<b>SECTION A</b>		
TRANSPORTATION (All expenses billed directly to the Government)	Common Carrier (Object Class 2143) Househunting (a) _____ Enroute (b) _____ Transportation of Household Goods-GBL (Object Class 2211) (c) _____ Transportation of POV-GBL (Object Class 2211) (d) _____ Storage of Household Goods-GBL (Object Class 2528) (e) _____ Extended Storage of Household Goods-GBL (Object Class 2528) (f) _____	\$
<b>SECTION B</b>		
OTHER TRANSPORTATION	Mileage, Taxi, Shuttle, Rental Car (Object Class 2140) Househunting (g) _____ Enroute (h) _____	\$
SUBSISTENCE EXPENSE	Per Diem (Object Class 2140) Househunting (i) _____ Enroute (j) _____	\$
OTHER EXPENSES	Miscellaneous Expenses (Object Class 2140) Househunting (k) _____ Enroute (l) _____ Miscellaneous Expense Allowance (Object Class 1216 ) (m) _____	\$
TEMPORARY QUARTERS	Temporary Quarters (Object Class 1209) (n) _____	\$
RELOCATION EXPENSES	Transportation Household Goods-Commuted (Object Class 2211) (o) _____ Transportation of POV-Commuted (Object Class 2211) (p) _____ Storage of Household Goods-Commuted (Object Class 2528) (q) _____ Extended Storage of Household Goods-Commuted (Object Class 2528) (r) _____ Real Estate (Object Class 1214) (s) _____	\$
SUB-TOTAL B		\$
TOTAL A & B		\$